

Western Area Power Administration



Information Technology

& Engineering

Professional Services

Performance Work Statement

February 2010

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1.0 **GENERAL**

The Western Area Power Administration (WAPA) markets and delivers reliable, cost-based hydroelectric power and related services within a 15-state region of the central and western United States. WAPA is one of four power marketing administrations within the U.S. Department of Energy whose role is to market and transmit electricity from multi-use water projects. The Sierra Nevada Region (SNR) is one of four regions of the Western Area Power Administration. WAPA sells wholesale power and bulk wholesale transmission to local utilities. The electric companies get the power they deliver to consumers from a variety of sources, including wholesale power providers such as WAPA, purchases and exchanges from neighboring utilities and from its own power generators. SNR's responsibility is to keep bulk power moving through the interconnected transmission system so that electricity ultimately reaches homes or businesses. SNR also provides billing services to customers and receives payments and settlements.

- 1.1. **Location.** SNR is headquartered at 114 Parkshore Drive, Folsom, California 95630, and is responsible for a geographic service territory which includes Northern California and part of the State of Nevada. Additional personnel are remotely stationed at the following maintenance sites: Elverta Maintenance Facility and Switchyard (EMF) located at 7940 Sorento Road in Elverta California, Redding Maintenance Facility (RMF) located at 1545 Beltline Road in Redding California, Keswick Field Office (KFO) located at Keswick Dam Road in Keswick California, and Tracy Maintenance Facility (TMF) located at 16800 Kelso Road in Byron California. Services shall be performed at the SNR headquarters, with occasional travel to other SNR facilities/properties.
- 1.2. **Quality Assurance.** The government will monitor the Contractor's performance under this contract using Quality Assurance Surveillance Plan (QASP) inspections. (See Paragraph 7.0 Quality Assurance Surveillance Plan.) COR will inspect for compliance with contract terms. All surveillance observations will be recorded.
- 1.3. **Hours of work.** The Contractor shall ensure all regularly assigned personnel, unless otherwise indicated, are present and available for duty during the core business hours between 9:00 a.m. and 3:00 p.m. The Contractor shall ensure staff hours are such that sufficient coverage is provided during business hours. Contract employees shall not be present on any SNR facility outside of their assigned duties without prior consent from the applicable COR, CO, and PM. Where required, due to business constraints, the Contractor shall be on call. These times and days will be negotiated with the CO, COR, and Contractor. Additionally, to meet the customers' needs, Contractor employees may be asked to work staggered shifts to cover for customers' business requirements.
- 1.4. **Overtime.** Overtime may be required as directed by the government and must be approved in advance by the COR and/or the CO. The Contractor shall submit the following documents to be approved by the COR and/or CO: the date(s) the overtime is planned, the work being performed, the number of overtime hours estimated, and the actual hours incurred when work is completed.
- 1.5. **Travel.** It may be necessary for contract employees to periodically travel to other regions or off-site locations in the performance of their duties. Government-furnished vehicles shall be used to the maximum extent possible. Travel will be authorized and reimbursed at the actual costs incurred, not to exceed limitations established by the Federal Travel Regulations (FTR). The Contractor shall provide trip reports upon completion of the trip.

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- 1.6. **Government's Responsibility.** SNR shall provide building access, workspace, computer access, and office supplies. Access shall be provided to source code, software, and tools to assist the Contractor in meeting deliverables.
- 1.7. **Removal of Employees for Cause.** The CO can require that the Contractor immediately bar any Contractor employee from performing further work under this contract for any of, but not limited to, the following actions: Willful destruction or mishandling of government, vendor property; loitering; use of any tobacco products in other than designated areas; use of alcoholic beverages, illegal drugs, or illegal use of controlled substances; theft; execution of work in other than a skillful manner, displaying disruptive/unacceptable behavior (e.g., abusive, demeaning, foul, or threatening language and fighting), and willful violations of safety and security standards by Contractor personnel. Removal of any employees for such cause shall not constitute a valid basis for nonperformance of contract services or a claim for additional compensation.

2.0 SCOPE OF WORK

The Contractor shall be responsible for managing and overseeing a total work effort that will furnish all personnel, supervision, services, equipment, and supplies to perform Information Technology (IT) and Engineering services support. This customer focused and multi-location support includes implementation and maintenance of infrastructure, applications/programming support, and process operations. As workload needs and/or requirements change, the Contractor may be required to staff with a different mix/skill set than what may have been proposed when the contract was first awarded (Core Requirements).

- 2.1 **Reporting Structure.** The Contractor program manager (PM) and specified team leads shall be the focus of interface between government personnel and the Contractor. Government personnel shall not be responsible for supervising any Contractor personnel. The Contractor shall provide general management for work being handled by the contracting staff. The PM shall provide administrative supervision for Contractor employees. They shall monitor their work, assess their performance, and direct their hours of work to ensure contract compliance. In addition, the PM shall submit, as required, administrative and status reports to the COR. The PM may use team leads to support these duties.
- 2.2 **Safety.** In performing the required by this contract, the Contractor shall comply with all applicable Federal, state and local safety, health or industrial safety codes including the latest effective standards as promulgated by the Secretary of Labor the Department of Labor and Health Administration, Occupational Safety and Health Administration (OSHA), Safety and Health Standards (29 CFR 1910) and California OSHA. Whenever there is a conflict between the requirements of applicable Federal, State or local safety, health or industrial safety codes, the most stringent standard shall apply. The Government shall be liable only for negligence on the part of its employees under the Federal Claims Act as amended.
 - 2.2.1 The contractor shall establish and submit to the COR for review and approval, a safety program within 60 days after award of the contract. In California every employer has a legal obligation to provide and maintain a safe and healthful workplace for employees, according to the CalOSHA Act of 1973. As of 1991, a written effective Injury and Illness Prevention (IIP), Program is required.
 - 2.2.2 The contractor shall ensure that its employees have been appropriately instructed and trained in the proper use of any equipment, vehicles, and/or personal protective equipment which may be needed for the performance of duties. The Contractor shall

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assure that its employees comply with all appropriate Federal, state, and/or local safety rules and regulations in performance of duties.

- 2.2.3 All safety-related equipment needed by the contractor employees shall meet the requirements of the task to address hazards and will be utilized in accordance with prescribed standards. For any contract personnel that would require a field presence, appropriate personal protective equipment (PPE) will be worn. All required PPE to include foot protection, eye and face protection, hearing protection, head protection, clothing, gloves will meet the guidelines as set forth in Western's Occupational Safety and Health Order (Western Order 440.1, current edition) and prescribed industry safety requirements.

2.2.3.1 Protective footwear must meet current safety standards (ASTM F2413-05).

2.2.3.2 Eye and face protection (safety glasses) must meet the ANSI Z87-1 standards.

2.2.3.3 Government reimbursement for safety shoes and safety glasses is limited to one purchase every two years and in amounts specified in SNR's Personnel Protective Policy Guidelines, current document, and is currently \$150 (boots) and \$200 (safety glasses).

- 2.3 **Security.** Security of SNR facilities is a shared responsibility of both Federal and Contractor employees. The Contractor shall be required to perform tasks to assist SNR in identifying potential hazards and to assure that the integrity of the facilities is maintained.

During duty hours, the Contractor shall monitor mail, packages, and deliveries to identify potential hazards. Contractor employees shall notify the Safety and Security Officer and/or Security Guard whenever any suspicious/unusual activities and/or persons are noticed. After normal business hours, the Security Guard will be contacted.

Contractor employees shall protect their issued access identification badge. If the individual's access identification card is lost or damaged, the Safety and Security Officer will be notified in a timely fashion.. If individual is authorized access into a sensitive area, this must be done immediately to coincide with protocols.

- 2.3.1 Security Investigation Check - WH.0004-0002 Security processing for support service the Contractor and subcontractor personnel working on a WAPA site.

The government will pay for security checks on initial contract award and new employees resulting from new or increased scope of work. The Contractor is responsible for additional investigation check costs resulting from employee removals or replacements.

2.4 **Environmental**

- 2.4.1 Training - All new employees shall be required to take initial and annual environmental training.

- 2.4.2 Electronic Stewardship – All employees shall adhere to electronic stewardship policies by (i) ensuring preference for Electronic Product Environmental Assessment Tool (EPEAT) registered electronic products when suggesting products for purchase; (ii) establishing and implementing policies to enable power management, duplex printing, and other energy-efficient or environmentally preferable features on all eligible agency

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electronic products; (iii) employing environmentally sound practices with respect to the agency's disposition of all agency excess or surplus electronic products; (iv) ensuring the procurement of Energy Star and FEMP designated electronic equipment; and (v) implementing best management practices for energy-efficient management of servers and Federal data centers.

- 2.5 Quality Control (QC) Plan.** The Contractor shall establish and forward to the CO and COR an initial, complete, quality control plan two weeks after the award. The Contractor shall subsequently provide an updated copy of the quality control plan to the CO as changes occur throughout the period of performance for the contract. At a minimum the plan shall include the following:
- 2.5.1 Inspection System. The Contractor shall establish an inspection system that covers all the services to be performed under this contract. The inspection system shall identify the areas and items to be inspected, methods of inspection, inspection frequency, and the name(s) and title(s) of the person(s) who shall perform the inspection.
 - 2.5.2 Methods of Identifying Deficiencies. The Contractor shall establish methods for identifying (and preventing) deficiencies in the quality of services performed before the level of performance becomes unacceptable.
 - 2.5.3 Documenting Inspections/Results. The Contractor shall establish checklists for documenting all inspections conducted along with corrective actions taken. This documentation shall be immediately available to government representatives designated by the CO at any time during the term of the contract.
 - 2.5.4 Performance Evaluation Meetings. The Contractor's PM shall meet with the CO or COR weekly. Thereafter, they shall meet as deemed necessary by either party. When a meeting is held, the Contractor shall prepare a memorandum for record of the discussions, send the original to the CO, and furnish a copy to the COR. Meetings are considered to be a part of normal business operations and shall not be separately priced.
 - 2.5.5 Skills and Quantities. The Contractor shall describe training for establishing baseline and continuous learning to remain current with technical skills.
 - 2.5.6 Training. The Contractor shall describe a training plan and initial screening for their employees.
- 2.6 Performance Contingency Plan.** The Contractor shall provide to the CO an initial Performance Contingency Plan. The Contractor shall subsequently provide an updated copy of the quality control plan to the CO as changes occur throughout the period of performance for the contract. At a minimum this plan shall indicate:
- 2.6.1 How the Contractor shall notify the CO or COR of a possible disruption of contract performance.
 - 2.6.2 How the Contractor shall perform all work under this contract with minimum disruption of services to SNR.
 - 2.6.3 How the Contractor shall use supervisory and other personnel presently employed by the Contractor to minimize the impact of the possible disruption of contract performance.

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- 2.6.4 How the Contractor shall continue operations in the event of a National Security Alert or disaster that disables the facility.
- 2.6.5 How the Contractor shall process new employee or employee changeover in regards to a security check with minimum disruption of services to SNR.
- 2.7 **Government Performance of Work.** The government reserves the right to perform any work covered by this contract when required to provide SNR support. Such actions do not constitute a breach of contract by the government. The Contractor will not be paid for services performed by the government.
- 2.8 **Controls and Restrictions.** The following controls and restrictions generally apply to the tasks described below.
- 2.8.1 Future Projects. The Contractor shall not bid on future projects. Because the Contractor personnel will be knowledgeable to privileged information, the Contractor shall not have the ability to bid on future projects outside the scope of this contract for the life of this contract.
- 2.8.2 Initiation of Tasks. In the event an increase of effort or scope requires additional personnel or a position needs to be replaced due to contract personnel departure, the Contractor shall ensure appropriate staffing actions are in place no later than 2 weeks after the request. The Contractor shall ensure appropriate personnel are available to begin tasks no later than 30 days. In the event that the Contractor shall be unable to meet this implementation requirement, a deduction will be taken for the vacant position(s)/labor category in the month(s) for which the vacancy (ies) occurred.
- 2.8.3 Contractor Management Team. The Contractor management team shall provide for integration and coordination of the multiple disciplines which fall within the scope of support for this contract. The Contractor management team shall assist in the establishment of procedures, guidelines, and operating plans for maximum efficiency, security, and cost effectiveness in the utilization of IT or engineering services. The Contractor shall determine qualifications required to perform a task, hire qualified personnel to fill vacancies, and make appropriate assignments. The Contractor management team shall review the Contractor staff work for completeness and conformance with appropriate standards. The Contractor management team shall assure that assigned personnel are able, or are trained to maintain, or support all SNR IT and engineering programs and equipment.
- 2.8.3.1 The Contractor management team shall provide status reports, budget and overtime status reports, performance metrics reports, and any other reports identified by the government or the Contractor, as necessary. The format and frequency will be decided upon award of contract. The required format will be provided at time of award by the COR.
- 2.8.4 Dedicated Personnel. All personnel shall be dedicated (assigned full time to this Western contract only) in support of this contract.
- 2.8.5 Staff Coverage. The Contractor shall ensure appropriate coverage on tasks or projects when personnel take leave.
- 2.8.6 Training. SNR agrees to pay for any training directly related to a particular function as deemed appropriate and required by CO and/or COR. The Contractor's time will be paid at a rate of 8 hours a day for any full day of training.

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- 2.8.7 Working Off-Site. Upon approval of the COR, the Contractor may work off-site for specific tasks as designated by COR. If the Contractor has other work responsibilities that require on-site presence, the Contractor shall be available by phone and email to resolve problems at the SNR site. If the problems cannot be resolved via phone or email, the Contractor shall immediately report to the site to resolve the problems. The government can revoke the right to work off-site at any time.
- 2.8.8 Overtime/On-Call. Upon approval of the COR, the Contractor shall be requested to be on-call or work overtime. On these occasions, the Contractor staff shall be compensated by compensatory time off or payment in compliance with contract provisions. When compensatory time off is granted, this time shall be scheduled so as not to impact operations or put the government in a situation where work tasks cannot be accomplished.

2.8.9 On-Call Support Personnel Responsibilities:

- 1) When a call is received after hours, the on-call support person will attempt to determine the problem within 30 minutes of receiving a call and, within that timeframe, determine a time estimate for resolution and whether additional personnel need to be called. Every attempt should be made to restore users to their full functionality as soon as possible.
- 2) Should the call situation require a site visit, the on-call support person will inform the caller of their estimated response time, not to exceed 90 minutes. If the caller determines this is not timely enough, they will ask the on-call person to try to locate other support personnel to see if they can respond faster. Should another support person be available, the caller will be notified as to who will be handling the call.
- 3) On-call personnel are responsible for coverage during their agreed upon schedule with the COR. They must stay within a 90 minute response radius of SNR, and be available to respond within that timeframe (i.e., have transportation, not be incapacitated, etc.). Should the on-call person go outside of the radius, they must pre-arrange for alternate coverage by other personnel while they are outside the allotted response window. Any adjustments that are made with prior mutual consent of the parties are permissible.
- 4) The on-call person should document each call via a HEAT ticket, the problem encountered that caused the call, and the solution of each call in the on-line on-call database. This HEAT ticket documentation should be done as soon as possible and must be complete prior to the changeover to the next person on-call.

3.0 APPLICABLE DOCUMENTS

- 3.1 Appendix A - SNR/WAPA Standards Software.
- 3.2 Appendix B - Staffing Skills. As workload needs and/or requirements change, the Contractor may be required to staff with different staff levels and mix/combination than what may have been proposed when the contract was first awarded. See Appendix B for generic set of SNR skill sets.

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- 3.3 Office Management and Budget (OMB) Circular A130 Management of Information Resources, Appendix 3 Security of Automated Information Resources.
<http://www.whitehouse.gov/omb/circulars/a130/a130.html>
- 3.4 National Institute of Standards and Technology (NIST).
<http://csrc.nist.gov/publications/nistpubs/index.html>
- 3.5 Executive Order 13231 on Critical Infrastructure.
http://www.ncs.gov/library/policy_docs/eo_13231.pdf
- 3.6 Presidential Executive Order 13103 on Software Piracy.
http://www.cio.gov/Documents/guideline_eo_13103_nov_1999.html
- 3.7 Executive Order 13514; Federal Leadership in Environmental, Energy, and Economic Performance
http://www.whitehouse.gov/assets/documents/2009fedleader_eo_rel.pdf
- 3.8 Public Law 105-220, Section 508 Compliance.
http://www.cio.gov/Documents/SECTION_508_IMPLEMENTING_LAW.ppt
- 3.9 E-Government Act of 2002.
http://www.cio.gov/Documents/E-Government_Act_of_2002.pdf
- 3.10 Center for Internet Security (CIS)
<http://www.Cisecurity.org>
<http://www.us-cert.gov/federal/analytical.html>

4.0 SUMMARY OF REQUIREMENTS

The Contractor shall provide all skills and the ability to perform all tasks described in this section.

4.1 Information Technology Support Service Tasks. The Contractor shall have the ability to retain the skill sets necessary to accomplish the following tasks.

4.1.1 Infrastructure Support and Operations. Infrastructure Support and Operations are the tasks necessary to ensure daily operations of the Local Area Network (LAN), System Administration (UNIX, Novell, Microsoft, email), Desktop, Laptop, Hardware, and Audio/Visual Support.

4.1.1.1 *Desktop Operations.* The Contractor shall establish and maintain a fully functional Desktop facility providing on-site support from 6:30 a.m. to 4:30 p.m., Monday through Friday (except for Federal holidays)) to approximately 350 desktop computer users located in several locations within California.

4.1.1.1.1 *Provide Level 1 and 2 Support.* The Contractor shall provide knowledgeable, qualified IT Desktop support to resolve all technical questions and problems. The Contractor shall respond to all incoming inquiries in an accurate, responsive manner.

4.1.1.1.2 *Develop and Conduct a Customer Liaison Program.* The Contractor shall develop a customer liaison program that includes routine site visits, phone contacts, and issue resolution.

4.1.1.1.3 *Accurate Response Tailored to Customer Needs.* The Contractor shall provide accurate and current responses tailored to the individual needs of the customer and to the agency requirements.

4.1.1.1.4 *Call Follow-Up.* The Contractor shall develop and implement a process to ensure customers are satisfied with job results.

4.1.1.1.5 *Hardware/Software Request Submittal.* The Contractor shall assist in managing the SNR processes for tracking hardware and software

4.1.1.2 *Software Support.* The Contractor shall ensure software meets security standards under NIST security standards and comply with PL 105-220, Section 508. The Contractor shall additionally ensure systems within their responsibilities will meet the CIS standards for each system. See Paragraph 3.0 Applicable Documents. When evaluating and recommending new or upgraded software solutions, the Contractor shall ensure systems are certified and operate with existing multi-vendor solutions and are in compliance with existing SNR architecture. See Appendix A for current software and applicable versions.

4.1.1.2.1 *Operating System Support.* The Contractor shall manage and support all assigned operating systems and major software assigned. This task includes, but is not limited to, server operating systems (Novell, UNIX, Microsoft), Database Management Systems (Oracle), desktop operating systems, office automation software, and email. Operating

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systems support also includes user and group account maintenance for software and assisting in application installations and configurations.

- 4.1.1.2.2 *Create Operating System Scripts.* The Contractor shall have the ability to create operating scripts to automate administration functions, run background processes, etc. These scripts may be written for UNIX, Novell, Microsoft, Oracle, or other major software.
- 4.1.1.2.3 *Install New or Upgrade Existing Software.* The Contractor shall accomplish request for new installs, upgrades and/or changes of all software such as, but not limited to, operating systems, email, special application software, office automation software and special user requested software, and will be at the request of COR and shall be planned to have minimum impact on the customers. The Contractor shall ensure that software installed is tested, reliable, available, and maintainable.
- 4.1.1.2.4 *Support Existing Software.* The Contractor shall ensure that software systems are maintained and supported in compliance with existing warranties, maintenance agreements, and/or supported with in-house staff.
- 4.1.1.2.5 *Recommend New Software.* The Contractor shall provide assistance in recommending, advising, and assisting in selection and ordering all software such as, but not limited to, operating systems, special application software, office automation software, and special user requested software.
- 4.1.1.2.6 *Prepare Software for Disposal.* The Contractor will provide assistance in surplus and disposal of software following WAPA Policy for media sanitation and disposal policy. See Section 3.0 Applicable Documents.
- 4.1.1.2.7 *Backup and Recovery.* The Contractor shall ensure all systems installed meet the specified security and vulnerability standards, that system backup and disaster recovery plans comply with procedures following WAPA Backup and Data Recovery Standards, and that existing SNR hardware systems for backup (Veritas, Netbackup, Oracle RMAN, and current SANS system) are utilized. Additionally, plans must comply with NIST standards and Executive Order 13231 on Critical Infrastructure protection. See Section 3.0 Applicable Documents.
- 4.1.1.2.8 *Testing Plan for Installs, Changes, and Upgrades.* The Contractor shall ensure a test plan is in place and followed on any software install, change, or upgrade to ensure maximum reliability. The software shall include, but not be limited to, operating systems, email, special application software, office automation software, and special user requested software. The Contractor shall follow SNR configuration management policy (IT-005) and shall utilize existing

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software tools (Serena Team Tracker) for tracking changes through the different environments. The Contractor shall ensure documented proof of testing and receive documented management approval before moving to the next environment.

- 4.1.1.2.9 *Software Configuration.* The Contractor shall analyze, recommend, and implement upon COR approval software configurations to ensure optimum efficiency and security of software and equipment. The Contractor shall monitor, troubleshoot, and resolve system resource issues related to software or software configurations. The Contractor shall ensure security standards are met in accordance with NIST security standards and comply with PL 105-220, Section 508. See Section 3.0 Applicable Documents.
- 4.1.1.2.10 *Hardware Support.* The Contractor shall ensure hardware meets security standards following NIST security standards and comply with PL 105-220, Section 508. See Section 3.0 Applicable Documents. When evaluating and recommending new or upgraded hardware solutions, the Contractor shall ensure systems are certified and operate with existing multi-vendor solutions and are in compliance with existing SNR architecture. The Contractor shall follow SNR configuration management policy (IT-005) and shall utilize existing software tools (Serena Team Tracker) for tracking changes through the different environments. The Contractor shall ensure documented proof of testing and receive documented management approval before moving to the next environment. The Contractor shall additionally ensure systems within their responsibilities will meet the CIS standards.
- 4.1.1.2.11 *Deploy New Hardware.* The Contractor shall ensure that systems installed are reliable, available, and maintainable. This task shall include all hardware such as, but not limited to, backup systems, SAN, Servers, PCs, peripherals, and accessories.
- 4.1.1.2.12 *Move, Add, or Change Existing Hardware.* The Contractor shall accomplish requests for moves, adds, and/or changes of all hardware with the inclusion of backup systems, SAN, Servers, PCs, peripherals, and accessories. This will be at the request of the COR and shall be planned to have minimum impact on the customers. Hardware shall be installed in compliance with NIST security standards.
- 4.1.1.2.13 *Maintain Existing Hardware.* The Contractor shall ensure that systems are maintained and repaired in compliance with existing warranties, maintenance agreements, and/or physically repaired, and comply with NIST security standards. See Section 3.0 Applicable Documents.
- 4.1.1.2.14 *Recommend New Hardware and Technologies.* The Contractor shall provide assistance in recommending, advising, and assistance in

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selection and ordering all hardware with the inclusion of backup systems, SAN, servers, PCs, peripherals, and accessories.

- 4.1.1.2.15 *Prepare Hardware for Disposal.* Provide assistance in surplus and disposal of IT equipment following WAPA Policy for media sanitation and disposal policy. See Section 3.0 Applicable Documents.
- 4.1.1.2.16 *Backup and Recovery.* Systems installed shall meet the specified security and vulnerability standards; system backup and disaster recovery plans shall comply with procedures under the WAPA Backup and Data Recovery Standards utilizing existing SNR hardware systems for backup (Veritas and current SANS system). Additionally, plans shall comply with NIST standards and Executive Order 13231 on Critical Infrastructure protection. See Paragraph 3.0 Applicable Documents.
- 4.1.1.2.17 *Test Plan for Installs, Changes, and Upgrades.* The Contractor shall ensure a test plan is in place and followed on any hardware install, change, or upgrade to ensure maximum reliability of all hardware. This hardware shall include backup systems, SAN, servers, PCs, peripherals, and accessories. The Contractor shall follow the SNR configuration management policy (IT-005) and shall utilize existing software tools (Serena Team Tracker) for tracking changes through the different environments. The Contractor shall ensure documented proof of testing and receive documented management approval before moving to the next environment.
- 4.1.1.2.18 *Hardware Configuration.* The Contractor shall analyze, recommend, and implement upon COR approval, hardware configurations to ensure optimum efficiency of equipment. The Contractor shall monitor, troubleshoot and resolve system resource issues related to hardware or hardware configurations.
- 4.1.1.3 ***Audio/Visual Support.*** Minimal Audio/Visual Support is necessary to support customer presentations and training needs.
 - 4.1.1.3.1 *Presentation Setup.* The Contractor shall maintain projectors and laptops for check-out and assist customers in setting up equipment for presentations.
 - 4.1.1.3.2 *Training Room.* The Contractor shall maintain the training room PCs and ensure that PCs are set up for training classes. The Contractor shall assist customers in reserving and setting up training room for training classes.

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Estimated Workload	Estimated Quantities
a. Number of onsite people requiring supporting per year. (¶4.1.1.1)	195
b. Number of Desktop calls per month (¶4.1.1.1)	250-270
c. Number of off-site service calls per month (¶4.1.1.1.2)	5
d. Number of offsite people requiring remote support per year (¶4.1.1.1.2)	45
e. Number of applications/software/operating systems, per year (¶4.1.1.2)	See Appendix A
f. Number of Personal Computers (PCs), Laptops, Personal Desktop Assistants (PDA) per year (¶4.1.1.1)	350 PC, 30 Laptop, 10 PDA
g. Number of existing servers per year (¶4.1.1.2)	Folsom - 70 Elverta - 1 Keswick - 1 Redding - 1 Tracy – 1
h. Number of meetings requiring set-up/technical support per month (¶4.1.1.3)	8
i. Oracle Database to support per year (¶4.1.1.2.1)	44

4.1.1.4 **Standard Operations Procedures.** Standard Operating Procedures are the tasks that will assist to ensure IT Processes run efficiently.

4.1.1.4.1 *Develop and Document Standard Operating Procedures (SOP).* Where existent, SOPs shall be reviewed quarterly and updates should be maintained by version number and date. Preference to have the documentation stored in our document repository (Serena Version Manager) and, additionally, on the local area network. Where SOPs do not exist, the Contractor shall develop and document.

4.1.1.4.2 *Timely Notification on Government Actions.* The Contractor shall provide timely notification on items requiring government action.

4.1.1.4.3 *Develop System and Architecture Documentation.* The Contractor shall develop and maintain system designs and architecture drawings of systems, software, and infrastructure. These documents shall also include User manuals, system administration manuals, data model documents, and data dictionary documents.

4.1.1.5 **Configuration Management.** Configuration Management will support the government in change management processes and tracking of upgrades.

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- 4.1.1.5.1 *Manage Configuration Software and Documentation.* The Contractor shall support configuration management software defined by SNR. The Contractor shall assist or provide recommendation to improve procedures for government and contract staff to utilize configuration software to track software changes, version controls, and critical documentation.
- 4.1.1.6 *Technical Writing.* Contractor shall provide technical writings/documentation supporting Project Management, Application Development, Systems Administration, Network Engineering, Desktop Support, Real Time Systems, and Technical Operations.
- 4.1.1.6.1 Contractor shall prepare documentation in support of projects and operations which consist of and use both commercial off the shelf (COTS) hardware/software and government developed software.
- 4.1.1.6.2 Contractor shall develop documentation using the format and software approved by the COR. All deliverables will be in both electronic and hard copy. File format for electronic copies will be approved by the COR.
- 4.1.1.7 *Asset Management.* Asset management will provide support to ensure government property is tracked, monitored, and in compliance with applicable laws, licenses, and warranties.
- 4.1.1.7.1 *Hardware Tracking.* The Contractor shall work with government property staff to develop and track hardware assets. Process shall include authorization signatures and paper trail throughout asset lifecycle. The Contractor shall, where possible, utilize existing SNR software to develop asset tracking processes and reports.
- 4.1.1.7.2 *Software Tracking and License Management.* The Contractor shall work with government property staff to develop and track software assets. Process shall include authorization signatures and paper trail throughout asset lifecycle. The Contractor shall, where possible, utilize existing SNR software to develop asset tracking processes and reports. The Contractor shall develop a process to manage software licenses that adheres to Presidential Executive Order 13103 (August 1999) on Software Piracy. See Paragraph 3.0 Applicable Documents and Appendix A for list of software. Number of individual software licenses will be provided upon award of contract.
- 4.1.1.7.3 *Maintenance Contract Oversight.* The Contractor shall review and ensure that maintenance contracts and warranties on hardware and software are managed for compliance, reviewed for necessity, and recommended to government for renewal within the government budget cycle.
- 4.1.1.8 *Program Support.* The Contractor shall provide program support tasks that are overarching across all other tasks. On unique tasks or special projects, the Contractor shall review with the COR to assure solution is approved and in compliance with IT standards.

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- 4.1.1.8.1 *Contractor Personnel are Courteous and Efficient.* Personnel shall be courteous and shall accurately and efficiently support all customers in a professional manner.
- 4.1.1.8.2 *Conduct Formal and Informal Training Sessions.* The Contractor shall recommend, develop, and present training forums where identified as a necessary tool to assist customers in effectively utilizing automation tools. Training is appropriate for the users' needs, ranging from desktop users to system administrators.
- 4.1.1.8.3 *Assure Continuous Quality Improvements in Service and Technology.* The Contractor shall be knowledgeable of current and emerging technologies and shall continue to remain knowledgeable throughout the life of the contract. The Contractor shall identify and recommend improvements in service and technology that could be implemented.
- 4.1.1.8.4 *Ad Hoc Special Projects.* At COR request, assist in implementing special projects on an ad hoc basis including, but not limited to, major software/hardware installations, large equipment relocation, market research, project management, and consultations.
- 4.1.1.9 ***Reporting Procedures.*** Reporting procedures tasks include developing reports to keep the government informed about work and to assist government personnel in creating ad hoc and routine reports for higher headquarters and local reporting needs.
 - 4.1.1.9.1 *Trouble-Call Tracking.* The Contractor shall monitor call tracking database and ensure calls are resolved in an expeditious manner. This is to include both the help desk program and the Serena Team Tracker system.
 - 4.1.1.9.2 *Trouble-Call Problem Documentation.* Responses in databases shall be complete, understandable, and contain accurate information. Calls shall be entered immediately or within a reasonable time period after call request was made. All interim actions shall be thoroughly documented before closure. Large problems that have impact to the organizations operations shall be documented in a formal report in a format agreed upon by the COR.
 - 4.1.1.9.3 *Report Statistics.* The Contractor shall submit bi-weekly and monthly call service statistic reports and project updates to the COR. The bi-weekly reports shall provide accurate and complete data concerning contractor personnel activity and performance. Monthly report will provide accurate and complete data representing monthly aggregates of weekly reports. Reports shall include, but not be limited to, trending information, call status, and open issues. The Contractor shall produce ad hoc reports as requested by COR.
 - 4.1.1.9.4 *Technical Reports.* The Contractor shall, at the request of the COR, produce technical, financial, and project reports. These reports can include, but not be limited to, DOE reporting, Exhibit 53, Exhibit

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300, Cost Justification documents, Business case justification documents, and upper-level management presentations.

- 4.1.1.10 ***Software Patch Management.*** The Contractor shall ensure that all software and security patches for software are tested, installed, tracked, and monitored.

- 4.1.2 Applications/Programming Support. Applications/Programming Support are the tasks necessary to ensure mission critical and mission essential systems and processes operate in a reliable, efficient manner. The Contractor shall ensure security standards are met following NIST security standards and comply with PL 105-220, Section 508. See Paragraph 3.0 Applicable Documents.

- 4.1.2.1 ***Applications Management and Software Development.*** SNR IT policy is to purchase systems commercially off the shelf (COTS), but where the needs are specialized, development and programming will be necessary. These tasks can include, but not limited to, recommending and implementing a COTS system or the integration of two or more disparate systems requiring customized coding, special reports, or data transfer.

- 4.1.2.1.1 ***Develop and Document User Requirements and Business Processes.*** The Contractor shall gather and document user requirements and business processes that are identified to be automated by the Government. The Contractor shall recommend whether solution should be developed in- house or purchased COTS. Once a solution is approved and purchased by the government, the Contractor shall take appropriate actions to implement project. Software programs and projects shall be delivered in accordance with a stated schedule developed by the Contractor and approved by the COR.

- 4.1.2.1.2 ***Program User Requirements and Business Process into Programs/Applications.*** Utilizing WAPA and SNR Enterprise Architecture Standards and security standards, the Contractor shall develop, test, and successfully demonstrate programs, reports, or applications prior to full implementation. Programs can be, but are not limited to, web/Java applications, data transfers, system integration, or report development. Systems developed can be such programs as interfaces between commercial systems, in-house systems or web applications or upgrades, and enhancements to existing in-house systems and web applications. Interfaces with all system components shall be fully functional and seamless to users. Software programs shall be delivered in accordance with a stated schedule developed by the Contractor and approved by the task manager. All documentation used to develop programs/architecture, shall be delivered concurrent with the final software and, where appropriate, during the development, design, and implementation phases.

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- 4.1.2.1.3 *Troubleshoot and Resolve Programming Problems.* The Contractor shall troubleshoot and resolve problems with assigned applications in an efficient and timely manner. Major problems that have an impact to a large user base shall be documented with resolution and given to COR. Problems can be with customized programs, COTS programs, or development tools.
- 4.1.2.1.4 *Test Plan for Installs, Changes, and Upgrades.* The Contractor shall ensure a test plan is in place and followed on any software install, change, or upgrade to ensure maximum reliability. The Contractor shall follow SNR change management procedures.
- 4.1.2.1.5 *Develop Program and User Documentation.* The Contractor shall provide user guides and other documentation that are accurate, complete, and easy to use.
- 4.1.2.1.6 *Ensure Proper Training.* The Contractor shall ensure training is provided appropriately for the users needs, ranging from the end user to system administrators. The contractor shall ensure training is tailored to incorporate unique requirements where new systems/applications are developed or COTS systems are customized.
- 4.1.2.2 ***Enterprise Application Integration.*** The Contractor shall have the ability to utilize existing SNR integration tools to create, modify, or upgrade existing integration points between disparate systems.
 - 4.1.2.2.1 *User Requirements.* The Contractor shall gather user requirements for integration point design.
 - 4.1.2.2.2 *Design.* The Contractor shall design and develop integration points based on design.
 - 4.1.2.2.3 *Troubleshoot and Resolve Programming Problems.* The Contractor shall troubleshoot and resolve problems with assigned applications in an efficient and timely manner. Major problems that have an impact to a large user base shall be documented with resolution and given to the COR. Problems can be with customized programs, COTS programs, or development tools.
 - 4.1.2.2.4 *Test Plan for Installs, Changes, and Upgrades.* The Contractor shall ensure a test plan is in place and followed on any software install, change, or upgrade to ensure maximum reliability. The Contractor shall follow SNR change management procedures.
 - 4.1.2.2.5 *Develop Program and User Documentation.* The Contractor shall provide user guides and other document-tation that are accurate, complete, and easy to use. The contractor shall ensure documentation is tailored to incorporate unique requirements where new systems/applications are developed or COTS systems are customized.

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- 4.1.2.2.6 *Ensure Proper Training.* The Contractor shall ensure training is provided appropriately for the users needs, ranging from the end user to system administrators. The contractor shall ensure training is tailored to incorporate unique requirements where new systems/applications are developed or COTS systems are customized.
- 4.1.2.3 ***Project Management.*** The Contractor shall provide guidance, plans, and procedures to enable successful project management within SNR.
- 4.1.2.3.1 *Project Status and Updates.* The Contractor shall evaluate and track individual project status, schedules, and costs/budgets of ongoing projects. Status reports will be given to the COR, weekly, on all projects. Where Earned Value Management is required, (EVM) metrics will be provided. The Contractor shall maintain and update the IT project management web site as a key communication tool for customers. The Contractor shall keep in mind the mission and ensure communications on projects that overlap or impact one another are managed effectively.
- 4.1.2.3.2 *Coach/Mentor Functional and IT Project Managers.* The Contractor shall serve as a technical consultant in activities that require expert knowledge of project management. The Contractor shall develop project management templates and assist IT project managers in developing project documentation such as, but not limited to, project plans, project charters, Work Breakdown Structures, Communications Plans, and cost justifications. The Contractor shall perform evaluations and determination of technical project documentation requirements.
- 4.1.2.3.3 *Coordinate/Facilitate Meetings.* The Contractor shall conduct or support technical planning and review meetings to support project communications and system requirements gathering.
- 4.1.2.3.4 *Provide Risk Management.* The Contractor shall notify the government on project risks and required government action. Risks to be managed include, but are not limited to, schedule slippage, resource allocation, and budget overruns.
- 4.1.2.4 ***Web Architect and Services.*** The Contractor shall serve as Internet expert and web architect. The Contractor shall perform the technical planning, design, development, testing, implementation, and management of Internet/Intranet and portal activities in support of SNR. The Contractor shall work towards achieving goals set forth in the E-Government act of 2002 when developing web architecture. The Contractor shall also ensure web design complies with NIST security standards, PL 105-220, Section 508 compliance and the WAPA Security Architecture Plans. See Paragraph 3.0 Applicable Documents.
- 4.1.2.4.1 *Research and Recommend Web Tools and Technologies.* The Contractor shall research state-of-the-art web site development

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tools and technologies, make recommendations to the COR and implement such tools to create new pages, sites, and applications.

- 4.1.2.4.2 *Maintain and Enhance Web Architecture.* The Contractor shall administer web servers, application servers, and other web tools. Recommendation of changes to the architecture shall be made to the COR and shall take into consideration functionality, security, and integrity of the Internet/Intranet services. The Contractor shall troubleshoot and resolve technical problems with design and delivery of Internet/Intranet services. The Contractor shall ensure adherence to NIST security standards and PL 105-220, Section 508 compliance. See Paragraph 3.0 Applicable Documents.
- 4.1.2.4.3 *Develop and Maintain Appealing and Technical Web Pages, Portals, and Sites.* The Contractor shall meet with subject matter experts and prepare pages/site/portals, etc. into visually appealing web-based graphics that enhance the image of SNR. The Contractor shall be responsible for ensuring updates are carried out in a timely fashion and that information continues to be properly displayed. The Contractor shall provide graphic design support for a wide variety of projects that may or may not involve the internet. The Contractor shall ensure adherence to NIST security standards and PL 105-220, Section 508 compliance. See Paragraph 3.0 Applicable Documents.
- 4.1.2.4.4 *Develop Document and Update Web Standards.* The Contractor shall develop, with customer and technical staff input, standards for web page, and portal development. The Contractor shall incorporate government requirements and corporate branding and shall continuously review and update standards and policies. The Contractor shall also conduct period reviews on web sites for trend analysis. Trend analysis shall utilize automated tools to track statistics and monitor for performance and security.

Estimated Workload	
a. Number of applications developed per year (§4.1.2.1)	2-3 Multi-user
b. Develop and Test Environment to support (§4.1.2.1)	4
c. Number of in-house applications/software supported per year (§4.1.2.1.3)	See Appendix A
d. Number of IT projects to be tracked and reported per month (§4.1.2.3)	5 Normal business
e. Number of estimated middleware integration points to support per year (§4.1.2.2)	15

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f. Number of existing web pages to be maintained internal/external per month (§4.1.2.4)	100 Internal 100 External
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4.1.3 **Process Operations.** Process Operations include tasks that ensure IT processes, procedures, and policies operate to the benefit of the government.

4.1.3.1 **Configuration Management.** Configuration Management will support the government in change management processes and tracking of upgrades. The Contractor shall follow SNR configuration management policy (IT-005) and shall utilize existing software tools (Serena Team Tracker) for tracking changes through the different environments. The Contractor shall ensure documented proof of testing and receive documented management approval before moving to the next environment.

4.1.3.1.1 *Manage Configuration Software and Documentation.* The Contractor shall support configuration management software defined by SNR. The Contractor shall assist or provide recommendation to improve procedures for government and contract staff to utilize configuration software to track software changes, version controls, and critical documentation.

4.1.3.1.2 *Coordinate Software and Hardware Changes.* The Contractor shall develop project plans, test plans, and user communication plans for major upgrades, enhancements or replacements to software, and hardware. The Contractor shall utilize configuration management software and processes for changes.

4.1.3.1.3 *Software Patch Management.* The Contractor shall ensure that all software and security patches for software are tested, installed, tracked, and monitored.

4.1.3.2 **Quality Assurance.** Quality Assurance Testing will support government in performing testing processes for programmatic changes, upgrades of various software, and conduct regression test impact on existing systems.

4.1.3.2.1 *Coordinate Tests.* Contractor shall coordinate, plan and oversee tests for unit, system and integration testing efforts. These tests shall be implemented in different environments and shall include white box testing, black box testing, regression testing, etc.

4.1.3.2.2 *Develop Tests.* Contractor shall have the ability to develop test plans, test strategy, test scenarios, test scripts, design testing process, and architecture, compile test data, and perform manual and automated tests.

4.1.3.2.3 *Variance Testing.* Contractor shall record test variances, ensure resolution, and retest variance according to test process.

4.1.3.3 **Standard Operations Procedures.** Standard Operating Procedures are the tasks that will assist to ensure IT Processes run efficiently.

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- 4.1.3.3.1 *Develop and Document Standard Operating Procedures (SOP).* Where existent, SOPs shall be reviewed quarterly and updates should be maintained by version number and date. Preference to be posted to the web. Where SOPs do not exist, the Contractor shall develop and document.
- 4.1.3.3.2 *Timely Notification on Government Actions.* The Contractor shall provide timely notification on items requiring government action.
- 4.1.3.3.3 *Develop System and Architecture Documentation.* The Contractor shall develop and maintain system designs and architecture drawings of networks, systems, software, and infrastructure on assigned systems. These documents shall also include user manuals, system administration manuals, data model documents, and data dictionary documents.
- 4.1.3.4 ***Program Support.*** The Contractor shall provide program support tasks that are overarching across all other tasks. On unique tasks or special projects, the Contractor shall review with the COR to assure a solution is approved and in compliance with IT standards.
 - 4.1.3.4.1 *Contractor Personnel are Courteous and Efficient.* Personnel shall be courteous and shall accurately and efficiently support all customers in a professional manner.
 - 4.1.3.4.2 *Conduct Formal and Informal Training Sessions.* The Contractor shall recommend, develop, and present training forums where identified as a necessary tool to assist customers in effectively utilizing automation tools. Training is appropriate for the users' needs, ranging from desktop users to system administrators.
 - 4.1.3.4.3 *Assure Continuous Quality Improvements in Service and Technology.* The Contractor shall identify and recommend improvements in service and technology that could be implemented.
 - 4.1.3.4.4 *Ad Hoc Special Projects.* At COR request, assist in implementing special projects on an ad hoc basis, including (but not limited to): Major software/hardware installations, large equipment relocation, market research, project management, and consultations.
 - 4.1.3.4.5 *Report Statistics.* Contractor shall submit weekly and monthly call service statistic reports and project updates. The weekly reports shall provide accurate and complete data concerning contractor personnel activity and performance. Monthly report will provide accurate and complete data representing monthly aggregates of weekly reports. Reports shall include, but not limited to, trending information, call status, and open issues. Contractor shall produce ad hoc reports as requested by COR.
- 4.1.3.5 ***Reporting Procedures.*** Reporting procedures tasks include developing reports to keep the government informed about work and to assist government personnel in

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creating ad hoc and routine reports for higher headquarters and local reporting needs.

4.1.3.5.1 *Trouble-Call Problem Documentation.* Responses in Serena Team Tracker/Heat Help Desk database shall be complete, understandable, and contain accurate information. Calls shall be entered immediately or within a reasonable time period after call request was made. All interim actions shall be thoroughly documented before closure. Large problems that have impact to the organizations operations shall be documented in a formal report in a format agreed upon by the COR.

4.1.3.5.2 *Technical Reports.* The Contractor shall, at the request of the COR, produce technical, financial, and project reports. These reports can include, but not be limited to, DOE reporting, Exhibit 53, Exhibit 300, Cost Justification documents, Business case justification documents, and upper-level management presentations.

4.2 **Engineering Support Service Tasks.** The Contractor shall have the ability to retain the skill sets necessary to accomplish the following tasks.

4.2.1 Telecommunications Engineering Support. Telecommunications Engineering Support Tasks are activities to insure the correct, efficient and effective operation of data telecommunications equipment and systems within SNR. The Contractor shall perform technical support, configuration and troubleshooting support for Telecommunications Engineering Support. This support will include reliability analysis, design, expertise and contract review support.

4.2.1.1 *Reliability and Maintainability Analysis.* Contractor shall have the ability to evaluate the reliability and maintainability of existing fiber, microwave, SONET, UHF, and VHF telecommunication systems. Contractor shall be capable of recognizing bottlenecks and potential 'weak-links' in communications paths. Contractor shall estimate future growth of existing systems and propose new or enhanced solutions.

4.2.1.2 *Telecommunications Design.* Contractor shall have ability to design telecommunications system for new facilities, and/or modify existing facilities. Contractor shall be able to evaluate a variety of telecommunication systems such as fiber, microwave, SONET, UHF, VHF, and copper cable, and shall be able to contrast those systems with physical, economic, and time limitations, and additionally shall determine the optimal communication solution for a given number of circumstances. Contractor shall be involved with the overall design of new facilities to determine telecommunication requirements, and needs such as space and power requirements. Contractor shall be able to verbally document requirements and use block diagrams to demonstrate existing and proposed solutions.

4.2.1.3 *Communications Expertise and Assistance.* Contractor shall be able to assist technical and non-technical personnel in a variety of voice and digital protocols. Contractor shall, upon request, present solutions to

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management and answer technical questions during oral presentations. Contractor shall provide optimal solutions, and interpret capabilities of existing and proposed systems.

4.2.1.4 *Contract Development, Review, and Commentary.* Contractor shall develop communications installation/construction contracts with outside agencies upon request. Contractor shall review Communication System contracts during development, after award, and provide expert assistance and interpretation.

4.2.1.5 *Task Allocation.* The table below lists the tasks required and estimates the quantity of tasks to be performed in an average year. These quantities may vary depending on future conditions.

Task	Estimated Quantity / Year
a) Telecomm System Analysis (§4.2.1.1)	40
b) Telecomm System Design (§4.2.1.2)	10
c) Telecommunications Scheme Reviews (§4.2.1.4)	40
d) Contract Development/Review (§4.2.1.4)	15

4.2.2 Drafting Support. The Contractor shall provide drafting services utilizing AutoCAD, freehand, and Leroy-type lettering.

4.2.2.1 *Engineering Drafting.* Contractor must be able to do “to scale” drawings and be able to use paper space and model space. All drafting performed by the Contractor shall follow Western Drafting Standards. Contractor shall prepare new engineering drawings from rough or finished sketches, marked prints, etc. Contractor shall make revisions of existing drawings from marked prints to reflect changes or to show “as-built” status of a feature or portion of a feature. Maintain records of all incoming and outgoing work orders for review by COR. Contractor shall provide support to install and configure AutoCAD to other AutoCAD users.

Task	Estimated Quantity / Year
a) AutoCad Drawings (§4.2.2.1)	2400
b) Current FTE on contract	1

4.2.3 High Voltage Power System Engineering Support. The contractor shall perform technical planning, design, analysis, troubleshooting, project management support, and

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maintain engineering documentation. This support will include Construction Project Management, Protective Relay Systems, and High Voltage Systems.

4.2.3.1 *Construction Project Management.* Contractor shall provide Project Management support for a range of design and construction projects. Contractor shall coordinate project schedules, develop cost estimates, conduct design and construction meetings, review specifications, and provide project status updates to SNR management.

4.2.3.2 *Protective Relay system.* Contractor shall perform fault analysis, develop relay settings, maintain short circuit programs and relay database, maintain monitoring equipment, design addition/modifications to protective relay circuits.

4.2.3.3 *High Voltage Systems.* Contractor shall develop and maintain records for substation equipment maintenance, equipment analysis, and assess equipment specifications.

4.2.3.4 *Task Allocation.* The table below lists the tasks required and estimates the quantity of tasks to be performed in an average year. These quantities may vary depending on future conditions.

4.3 Task Allocation. The table below lists the tasks required, an estimates the quantity of tasks to be performed in an average year. These quantities may vary depending on .future conditions.

Task	Estimated Quantity / Year
a) Project Management Support (§4.2.3.1)	2
b) Relay Settings (§4.2.3.2)	15
c) Fault Analysis (§4.2.3.2)	8
d) Additions/Modifications of Protective Circuits (§4.2.3.2)	6
e) Maintain Equipment Records (§4.2.3.3)	12
f) Equipment Analysis (§4.2.3.3)	4

5.0 DELIVERABLES

Deliverable	Frequency	Paragraph Reference
Safety Plan and Safety Requirements	Within 60 days of contract award and during contract performance	¶2.2
Security Investigation Documentation	Within two weeks after contract award and with each	¶2.3

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	new employee.	
Quality Control Plan	At time of award and as required	¶2.4
Performance Contingency Plan	At time of award and as required/requested	¶2.5
Status, Budget, (Overtime, Travel & Training) and Performance Reports	Weekly/Monthly and as requested	¶2.8.3.1

6.0 PERFORMANCE ASSESSMENT PLAN

- 6.1 **Monitoring Performance.** During the course of the evaluation period, the COR will track the Contractor performance. At the end of the period, the COR will assess the Contractor's performance in accordance with the Quality Assurance Surveillance Plan and report to the CO.
- 6.2 **Contractor Self-Assessment.** Following each evaluation period, the Contractor may provide a written self-assessment of its performance to the COR to be considered in its report to the CO. The self-assessment shall be submitted not later than five working days after the end of each evaluation period. The self-assessment shall address both the strengths and weaknesses of the Contractor's performance during the evaluation period.
- 6.3 **COR Recommendation.** The COR will consider all evaluations and any other pertinent information and will prepare a report to the CO with findings and recommendations.
- 6.4 **Performance Determination.** The CO may meet with the COR to discuss the COR's report. The CO shall evaluate surveillance results and make a final performance determination in writing as to the percentage of work successfully completed and the resulting payment to be made. A copy of the performance determination will be provided to the Contractor no later than 15 calendar days after the end of the period being evaluated. All CO decisions regarding performance assessments are unilateral decisions made solely at the discretion of the Government.
- 6.5 **Unacceptable Performance.** Notwithstanding any other clause of this contract, unacceptable performance deductions will be made within the later of 60 days after the end of the evaluation period or 30 days after receipt of an approved invoice.
- 6.6 **Sample Calculation.** The following calculation is a representation of how all Disincentives will be calculated. The specific scenario reflects the Contractor submitting an invoice for \$20,000.00 against CLIN 0001 for December 2006, a possible 25 meetings were to be attended in this month and 4 meetings were not attended and were not excused by the COR or CO.

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Calculation

Month/YR: December 06

1. Invoiced Amount for CLIN <u>0001</u>	\$20,000.00
2. 100% of payment for Item: <u>2a</u>	10%
3. Max. payment (for item): <u>(#1 x #2)</u>	\$2,000.00
4. % of acceptable work (# of successfully attended or excused meetings per month/ # of scheduled meetings per month)	21/25 = 84%
5. Disincentive Adjustment: <u>(#3 x #4)</u>	\$1,680.00
6. Difference: <u>(#3 - #5)</u>	\$320.00
7. Adjusted Monthly Payment: <u>(#1 - #6)</u>	\$19,680.00

Information Technology Performance Requirements Summary (PRS) Items

(1) Services (shall be evaluated by Timeliness, Quality, and Accuracy)

(2) Attendance (shall be evaluated by Timeliness and Quality)

Required Service		Due Date	Method of Surveillance	Payment % for Meeting Requirement	COMMENT
7.1	Periodic status report to COR. Includes Desktops, LAN servers, application servers, Solaris systems, Backup systems, San servers, Oracle Databases and associated software, Operating systems and applications, Web functions and applications, project management oversight, programming projects, quality assurance, and configuration management. Report shall include status of SCR's, project schedules, notification of issues.	Not less than once a month	Document Review Weekly/Monthly Status Meetings	10%	
7.2	Weekly status meeting with COR. Meeting should cover on-going work efforts, issue resolution, new projects, and critical change management issues. Deliverable shall include weekly status report. Report shall address project schedules, work completed, work planned, and resolution to on-going issues.	Weekly	Document Review Weekly/Monthly Status Meetings	7%	
7.3	Troubleshoot and resolve technical problems with Desktops, LAN servers, application servers, Solaris systems, Backup systems, San servers, Oracle Databases and associated software, Operating systems and applications, web functions and applications, and programming projects. Compliance monitored through trouble ticket documentation and by COR oversight. Customer comments are also considered.	as directed by COR and Standard Operating Procedures	Document Review Weekly/Monthly Status Meetings	10%	
7.4	Customer Support. Call/on-call resolution and follow up will meet minimum agreed upon standards from COR and Business Systems Manager. Customer liaison program. Routinely visit field sites to provide support to desktops, and equipment for SNR staff in the field. Compliance monitored through trouble ticket documentation	Upon contract award, Service Level Agreement developed with COR and Business System Manager	Document Review Weekly/Monthly Status Meetings	10%	

Required Service		Due Date	Method of Surveillance	Payment % for Meeting Requirement	COMMENT
	and by COR oversight. Customer comments are also considered.				
7.5	<p>Software shall be installed, upgraded, patched, backed-up (and recovered as necessary), and in compliance with SNR and CIS standards on all systems, where required, and shall follow SNR procedures and standards for Testing, and Change management.</p> <p>Compliance will be monitored by COR oversight and review of test plans, test scripts, and CIS certification on systems.</p>	As requested	<p>Document Review</p> <p>Weekly/Monthly Status Meetings</p>	10%	
7.6	<p>Software development – custom software development shall follow SNR standards and practices, including but not limited to, requirements gathering, design documents, test plans, and implementation plans. Deliverables will include the above. In addition, development must follow SNR coding standards and architecture requirements.</p> <p>Compliance shall be monitored through COR oversight and review of test plans, test scripts, and CIS certification on systems.</p>	During each software project	<p>Document Review</p> <p>Weekly/Monthly Status Meetings</p>	10%	
7.7	<p>Provide technical and business process expertise to monitor, analyze, design, document, and implement software/hardware modifications, change requests, and new software projects.</p> <p>Compliance shall be monitored through COR oversight and review of code walkthroughs, test plans, test scripts, and CIS certification on systems.</p>	As requested by COR or Standard Operating Procedures	<p>Document Review</p> <p>Weekly/Monthly Status Meetings</p>	10%	
7.8	<p>Documentation – provide project documentation including but not limited to requirements documents, business cases, use cases, design documents, trouble report documentation, status reports, test plans, project plans, schedules, charters, and test results following SNR standard templates.</p> <p>Compliance shall be monitored by COR oversight and Government acceptance of documents.</p>	As requested by COR or Standard Operating Procedures	<p>Document Review</p> <p>Weekly/Monthly Status Meetings</p>	8%	

Required Service		Due Date	Method of Surveillance	Payment % for Meeting Requirement	COMMENT
7.9	<p>Project Management- the contractor shall conduct project management/oversight in accordance with SNR-Western Project management standards/methodology and project deliverables.</p> <p>Compliance shall be monitored by COR oversight and government acceptance of documents.</p>	As requested by COR or Standard Operating Procedures	<p>Document Review</p> <p>Weekly/Monthly Status Meetings</p>	10%	
7.10	<p>Time and Attendance – On-site during core business hours. The hours and attendance shall be during regular working hours. After hours attendance will be determined by each system requirements.</p> <p>Compliance shall be monitored by COR oversight and approval.</p>	As requested by COR or Standard Operating Procedures	<p>Document Review</p> <p>Weekly/Monthly Status Meetings</p>	5%	
7.11	<p>Support</p> <p>Provide customer/technical support, during regular business and off hours as required. Support will include meetings, phone calls, work plans and reports as required. Performance will be measured by customer feedback and system performance metrics.</p> <p>Compliance shall be monitored by COR oversight.</p>	As requested by COR or Standard Operating Procedures	<p>Document Review</p> <p>Weekly/Monthly Status Meetings</p>	10%	

Engineering Performance Requirements Summary (PRS) Items

(1) Services (shall be evaluated by Timeliness, Quality, and Accuracy) (2) Attendance (shall be evaluated by Timeliness and Quality)

Required Service		Due Date	Method of Surveillance	Payment % for Meeting Requirement	COMMENT
7.10	Telecommunications Engineering Support : shall be provided IAW PWS ¶4.2.1	As requested by COR	Document Review Weekly/Monthly Status Meetings	35%	
7.11	Drafting Support: Support: shall be provided IAW PWS ¶4.2.2 High Voltage Power System Engineering Support: shall be provided IAW PWS ¶4.2.3	As workload /projects require and as requested by COR As requested by COR	Document Review Weekly/Monthly Status Meetings	35%	
7.12			Document Review Weekly/Monthly Status Meetings	30%	

7.0 **QUALITY ASSURANCE SURVEILLANCE PLAN.**

The Quality Assurance Surveillance Plan (QASP) indicates the service outputs of the Contractor that the government will evaluate to assure the Contractor meets standards of performance. The purpose of the QASP is to identify to the Contractor the levels of performance required to warrant full payment. The absence of the QASP of any contract requirement, however, shall not detract from its enforceability or limit the rights or remedies of the government under any other provision of the contract, to include the “Inspection of Services” clause, in determining the quality of the Contractor performance.

Information Technology Performance Standards Quality Assurance Surveillance Plan (QASP)

(1) Services (shall be evaluated by Timeliness, Quality, and Accuracy)

(2) Attendance (shall be evaluated by Timeliness and Quality)

	Required Service	Due Date	Completed Y/N	COMMENT
7.1	Periodic status report to COR. Includes Desktops, LAN servers, application servers, Solaris systems, Backup systems, San servers, Oracle Databases and associated software, Operating systems and applications, Web functions and applications, project management oversight, programming projects, quality assurance, and configuration management. Report shall include status of SCR's, project schedules, notification of issues.	Not less than once a month		
7.2	Weekly status meeting with COR. Meeting should cover on-going work efforts, issue resolution, new projects, and critical change management issues. Deliverable shall include weekly status report. Report shall address project schedules, work completed, work planned, and resolution to on-going issues.	Weekly		
7.3	Troubleshoot and resolve technical problems with web functions and applications, and programming projects, desktops, LAN servers, application servers, Solaris systems, Backup systems, San servers, Oracle Databases and associated software, Operating systems and applications. Compliance monitored through trouble ticket documentation and by COR oversight. Customer comments are also considered.	as directed by COR and Standard operating procedures		

Required Service		Due Date	Completed Y/N	COMMENT
7.4	<p>Customer Support. Call/on-call resolution and follow up will meet minimum agreed upon standards from COR and Business Systems Manager. Routinely visit field sites to provide support to desktops, and equipment for SNR staff in the field.</p> <p>Compliance monitored through trouble ticket documentation and by COR oversight. Customer comments are also considered.</p>	Upon contract award, Service Level Agreement developed with COR and Business system manager		
7.5	<p>Software shall be installed, upgraded, patched, backed-up (and recovered as necessary), and in compliance with SNR and CIS standards on all systems, where required, and shall follow SNR procedures and standards for Testing, and Change management.</p> <p>Customer Support. Call resolution and follow up will meet minimum agreed upon standards from COR and Business Systems Manager</p> <p>Software shall be installed, upgraded, patched, backed-up (and recovered as necessary) and in compliance with CIS standards on all systems including Novell, Microsoft, Solaris, Oracle</p> <p>Compliance will be monitored by COR oversight and review of test plans, test scripts, and CIS certification on systems.</p>	As requested or upon contract award, Service Level Agreement developed with COR and Business system manager		
7.6	<p>Software development – custom software development shall follow SNR standards and practices, including but not limited to, requirements gathering, design documents, test plans, and implementation plans. Deliverables will include the above. In addition, development must follow SNR coding standards and architecture requirements.</p> <p>Compliance shall be monitored through COR oversight and review of test plans, test scripts, and CIS certification on systems.</p>	During each software project		
7.7	Provide technical and business process expertise to monitor, analyze, design, document, and implement software/hardware modifications, change requests, and new software projects.	As requested by COR or standard operating procedures for each install and upgrade		

Required Service		Due Date	Completed Y/N	COMMENT
	<p>Software and Hardware shall follow SNR procedures for Testing and Change management. Deliverables will include test plans and test results.</p> <p>Compliance shall be monitored through COR oversight and review of code walkthroughs, test plans, test scripts, and CIS certification on systems.</p>			
7.8	<p>Documentation – provide project documentation including but not limited to requirements documents, business cases, use cases, design documents, trouble report documentation, status reports, test plans, project plans, schedules, charters, and test results following SNR standard templates.</p> <p>Compliance shall be monitored by COR oversight and Government acceptance of documents.</p>	As requested by COR or standard operating procedures		
7.9	<p>Project Management- the contractor shall conduct project management/oversight in accordance with SNR-Western Project management standards/methodology and project deliverables.</p> <p>Provide technical and business process expertise to monitor, analyze, design, document, and implement software/hardware modifications, and Software Change Requests,</p> <p>Compliance shall be monitored by COR oversight and government acceptance of documents.</p>	As requested by COR or standard operating procedures		
7.10	<p>Time and Attendance – On-site during core business hours. The hours and attendance shall be during regular working hours. After hours attendance will be determined by each system requirements.</p> <p>Compliance shall be monitored by COR oversight and approval.</p>	As requested by COR or standard operating procedures		
7.11	<p>Support</p> <p>Provide customer/technical support, during regular business and off hours as required. Support will include meetings,</p>	As requested by COR or standard operating procedures		

Required Service		Due Date	Completed Y/N	COMMENT
	phone calls, work plans and reports as required. Performance will be measured by customer feedback and system performance metrics. Compliance shall be monitored by COR oversight.			
7.12	Periodic status report to COR and Business Systems Manager. Includes Desktops, LAN servers, application servers, Solaris systems, Backup systems, San servers, Oracle Databases and associated software, Operating systems and applications.	Not less than once a month	Document Review Weekly/Monthly Status Meetings	
7.13	Weekly status meeting with COR and Business Systems Manager. Meeting should cover on-going work efforts, issue resolution, new projects, and critical change management issues.	Weekly	Document Review Weekly/Monthly Status Meetings	
7.14	Troubleshoot and resolve technical problems with Desktops, LAN servers, application servers, Solaris systems, Backup systems, San servers, Oracle Databases and associated software, Operating systems and applications.	as directed by COR and Standard operating procedures	Document Review Weekly/Monthly Status Meetings	
7.15	Customer liaison program. Routinely visit field sites to provide support to desktops, and equipment for SNR staff in the field.	Monthly per each site, and as directed by COR	Document Review Weekly/Monthly Status Meetings	
7.16	Customer Support. Call resolution and follow up will meet minimum agreed upon standards from COR and Business Systems Manager	Upon contract award, Service Level Agreement developed with COR and Business system manager	Document Review Weekly/Monthly Status Meetings	
7.17	Software shall be installed, upgraded, patched, backed-up (and recovered as necessary) and in compliance with CIS standards on all systems including Novell, Microsoft, Solaris, Oracle	As requested by COR	Document Review Weekly/Monthly Status Meetings	
7.18	Software and Hardware shall follow SNR procedures for Testing and Change management. Deliverables will include test plans and test results.		Document Review Weekly/Monthly	

Required Service		Due Date	Completed Y/N	COMMENT
		Each install and upgrade	Status Meetings	
7.19	Develop and Maintain Standard Operating Procedures	As requested by COR	Document Review Weekly/Monthly Status Meetings	
7.20	Provide technical and business process expertise to monitor, analyze, design, document, and implement software/hardware modifications, and Software Change Requests,	As requested by COR or standard operating procedures	Document Review Weekly/Monthly Status Meetings	

COR Signature: _____ Date: _____

Engineering Quality Assurance Surveillance Plan (QASP)

(1) Services (shall be evaluated by Timeliness, Quality, and Accuracy) (2) Attendance (shall be evaluated by Timeliness and Quality)

Required Service		Due Date	Acceptable Quality Levels (AQL)	COMMENT
7.10	Telecommunications Engineering Support (Data): Support: shall be provided IAW PWS ¶4.2.1	As requested by COR	95%	
7.11	Drafting Support: Support: shall be provided IAW PWS ¶4.2.2	As workload /projects require and as requested by COR	95%	
7.12	High Voltage Power System Engineering Support: shall be provided IAW PWS ¶4.2.3	As requested by COR	90%	

COR Signature: _____ Date: _____

Appendices

Appendix A

APPLICATION/OPERATING SYSTEM	
Hardware and OS platforms: 1) Windows 2003/2008 Server or higher with clustering services; 2) Sun Enterprise Server and Solaris 10 64 bit or higher Oracle Database: Oracle 10G	
Veritas: Cluster Server and Veritas File System, Net Backup	
Microsoft: Windows XP Professional higher; Office XP Professional or higher; Project 2002 or higher; Visio 2002 or higher; SQL Server with clustering services; IIS 6	
Novell: Netware Server Version 6.5 or higher/Client Version 4 or higher; Groupwise Version 7 or higher; ZENworks for Desktop Version 7 or higher; CITRIX;	
Adobe: Acrobat Professional	
ITRON: MV90Workstation; MV90COMM. Metrix IDR - Load Forecasting	
TrendMicro: Anti-virus	
SNC: Transmission and Outage Logging Application: Vendor application support	
ACS: Engineering Document Management System (used for CAD drawings) Pervasive	
Ventyx nMarket: California ISO Settlements tool Allocation Manager DAT Reporting Tool	
Java: Software Development language standard	
Hyperion/SQR: Reporting Tool	

APPLICATION/OPERATING SYSTEM
Open Access Technology International (OATI): webTag – Electronic Tagging System WebTrader - Merchant Scheduling SystemwebTrans: Reliability Scheduling System webCompliance – NERC Compliance Tracking Tool webCares – Certificate Management System
Serena Team Track : Tracking and Workflow application
Subversion: Source Code Management
Serena PVCS Version Manager
Macromedia: Contribute
Discoverer: Oracle Reporting tool
BEA: BEA Weblogic
TIBCO: TIBCO Business Works, TIBCO EMS, TIBCO Administrator
Xerox: DocuShare

Reference:

Ventyx nMarket - <http://www.ventyx.com/pdf/nMarket-Overview-cutsheet.pdf>

Serena PVCS - <http://www.serena.com/products/pvcs>

Hyperion SQR Production Reporting - <http://www.oracle.com/technology/products/bi/sqr-production-reporting.html>

Itron - <http://www.itron.com>

Novell - <http://www.novell.com>

TrendMicro - <http://www.trendmicro.com>

TIBCO – <http://www.tibco.com>

OATI – <http://www.oati.com>

Serena – <http://www.serena.com>

Appendix B

Position Descriptions

Qualification Requirements

1. Qualifications Requirements. The Contractor shall be responsible for assuring that technically proficient and experienced personnel are available at all times to meet the needs of SNR. The Contractor shall be responsible for assuring all personnel hired under this contract shall be able to perform their assigned tasks or demonstrate an ability to become proficient after a short orientation period. Wherever mandatory minimum industry standards exist (i.e., professional certification requirements), the Contractor shall assure that assigned personnel are in compliance. All personnel shall meet the Qualification Requirements for the position they are assigned to.
 2. Key Positions. The Program Manager is a key position for the performance of this support services contract. The Contractor shall submit a resume for approval by the CO prior to filling of the Program Manager position. Any changes to the key position will be subject to the approval of the CO.
 3. Professional Requirements by Skill Sets. SNR has identified general skill sets that have historically been utilized. These skill sets are not binding in terms of staff level or skills but the Contractor shall be responsible for accomplishing work at an acceptable level of performance.
 - a. *Program Manager.* Serves as program manager to work with the CO and COR, government personnel, and customer agency representatives. Responsible for the overall management of specific tasks and ensuring that the technical solutions and schedules in the task orders are implemented in a timely manner. The program manager shall have knowledge of the methods and procedures for providing a variety of IT and electric utility services, the ability to work with others, excellent organizational skills, ability to coordinate the work of others, good analytical skills, and the ability to make sound judgments and decisions. Program manager shall have a demonstrated experience in supervising in Information Technology and in electric utility related experience in the electric power (utility) fields. Must have 5 + years of experience in the implementation and management of information technology resources.
 - b. *UNIX System Administrator.* Assist in the daily activities of configuration and operation of UNIX business systems. Optimizes system operation and resource utilization, performs capacity planning and analysis. Will write, test, and validate software modules, system scripts, and code for integration and performance. Must have 2 + years of experience in UNIX system administration. Must have Oracle experience and knowledge of security procedures.
 - c. *LAN Specialist.* Manages the daily activities of configuration and operation of the LAN business systems. Optimizes system operation and resource utilization, performs capacity planning and analysis. Will write, test, and validate software modules, system scripts, and code for integration and performance. Must have 5 + years of experience in Novell Networks, MS Windows, MS office, and Novell
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- Groupwise system administration. Must have advanced working knowledge of PC hardware, related peripherals, laptop computers, system support utilities, business applications, and client server applications.
- d. *Customer Service/Help Desk Support.* Provides phone and in-person support to users in the areas of desktop support, hardware support, peripheral support, email, and other business applications. Serves as point of contact of IT troubleshooting, issues, roll-outs, etc. Must have 3 + years in providing customer service in an information technology environment. Must have working knowledge of Novell Networks, MS Windows, MS office, and Novell Groupwise system administration.
 - e. *Database Management Specialist.* Provides database management support. Defines table structures, indexing, backup, and security procedures. Must have knowledge of current Oracle. Must have a minimum of one to three years of experience in providing support.
 - f. *Configuration Management/Quality Assurance Specialist.* Establishes and maintains a process for tracking life cycle development of all hardware and software. Maintains continuity of products. Includes management of hardware, software, change control, pre-release testing, and verification. Coordinates and manages software testing among IT and end users. Produces test artifacts, including test plans, test scripts, and test reporting.
 - g. *Project Manager.* Oversee project throughout project lifecycle. Ensures documentation, budget, and scope are managed. Develop and track project status and documentation. Manage risk and communicate issues to stakeholders of project. Must have 3 + years in information technology project management.
 - h. *Systems/Integration Programmer (Junior, Mid, Senior).* Applies software, hardware, and interface standards information technology skills in the analysis, specification, development, integration, and acquisition of systems software. Coordinates closely with both the development staff and the user community to ensure smooth implementation. Must have at least three years experience in software programming functions. Knowledge of COTS products and methods to provide interoperable, portable, and scalable information technology solutions. Understanding of systems integration methodologies and technologies.
 - i. *Applications Programmer (Junior, Mid, Senior).* Analyzes functional business processes, programs, and design specifications for functional activities. Translates detailed design into computer software. Tests, debugs, and verifies software to produce the required product. Prepares required documentation. Enhances software to improve performance, operation, and efficiency. Must have minimum of 5 + years experience in providing application development and support. Knowledge of Java, Web technologies, Oracle, are a must.
 - j. *Technical Writer/Editor.* Assists in collecting and organizing information required for preparation of user's manuals, training materials, installation guides, special reports, or any other government requested deliverables and documents. Will prepare, maintain, and update any documentation. Must have 3 + years in developing

technical documentation for information technology or related areas. Must have excellent writing skills.

Web Master/Architect. (Junior, Mid, Senior). Will design, develop, and implement SNR web infrastructure to include sites, pages, software, technologies etc. Provide timely updates to web site requests. Must have knowledge of Oracle and basic web tools such as IIS server, apache, BEA Web Logic, Java Frameworks web page development tools, graphic design tools, portal technologies, etc.